

# Statement of Work Writing Conventions

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For additional guidance on Statement of Work preparation, required elements and contingency tasks, see Statement of Work Writing Guides for [Engineering Services \(A&E\)](#) or for [Personal Services \(Non A&E\)](#).

- Unless the Price Agreement requires a different format, use the currently posted [Standard Statement of Work Outline Template](#) found on the [Statement of Work Library](#). If starting with a previous contract, only copy task and deliverable information; not template language. Don't change the footer date of the Statement of Work template.
- If using task and deliverable language from another contract, revise to meet current project requirements, expectations, and specifics that apply to your project and contract.
- Give each task and subtask a number and a brief name.
- For each task, briefly describe the main purpose of the task.
- Assign responsibility for activities to be performed under the task.
  - Consultant shall...* (required for consultant)
  - Consultant may...* (optional for consultant)
  - Agency will...* (required for ODOT)
- Include tangible, measureable deliverables that will verify the purpose and objectives of the task have been met. Specify requirements for deliverable acceptance.
  - Deliverable **must**...* (describe requirements)
  - For example, "The Report must include a table of contents."*
- Be as detailed as reasonably possible when describing deliverables and requirements. If written standards exist, incorporate them into the contract by reference. If no written standards, can an example of a completed deliverable be provided to Consultant?
- When appropriate, require "draft" deliverable(s) to gauge quality so corrections can be made prior to final deliverable. Build enough time into the delivery schedule to allow Agency review of draft deliverables.
- When unable to determine specific tasks and deliverables to be completed, use a phased approach to the contract. For first phase, clearly describe the final objective of the contract and describe the process that will be used to determine specific tasks and deliverables needed for future phases.
- Do not use ambiguous words or phrases such as *we, they, our, assist, help, work with, acceptable, reasonable, best efforts, industry standards, and/or, bi-weekly, bi-monthly*.
- Do not use *assumptions, notes, the parties anticipate, and for budget purposes*. Write requirements based on the understanding at the time. Differences that require changes can be addressed by amendment.
- Define all acronyms in the body of the Statement of Work, then use the acronym consistently throughout the Statement of Work. For Statement of Work with multiple pages, also define acronyms in a separate table.
  - Consultant shall prepare an Interchange Area Management Plan ("IAMP"). The IAMP must...*
- Avoid using multiple terms to refer to the same thing. Instead, define a term, then use defined term consistently throughout the Statement of Work.
  - Consultant shall prepare an Implementation Project Status Report ("Status Report"). Status Report must...*
- For ease and consistency, when indicating a quantity use numerals. Do not write out the word.
  - Examples: ☺ 3 copies; 15 copies.      ☹ three copies; fifteen (15) copies.

- Either specify deliverable due dates within each task or list all deliverables and due dates in a table. Avoid listing due dates in both the task and separate table; creates conflict if a due date is revised in one area, but not the other.
- Do not include preparation of monthly invoices as part of a task, unless the consultant has a “Certification of Invoicing and ODC Billing Practices” on file in the [Accepted Rates folder](#) (ODOT only). Otherwise, the cost of preparing invoices is an indirect cost covered by consultant’s overhead rate or their negotiated billing rates.
- Only use limiting statements such as “this Project does not include...” when parties agree that certain services that typically would be performed by Consultant will not be included.

## Sample Task Layout

***If it’s not written (or incorporated by reference) in the contract, it’s not legally enforceable!***

Task number and brief name

### **Task 7 Preparation of Reports**

Task purpose

Consultant shall prepare and submit a Geotechnical Report and Subsurface and Foundation Data Sheets (“Geotech Report”) summarizing evaluations, analyses, and recommendations.

Deliverable requirements

Geotech Report must include:

- Site Plan and Vicinity Map showing the surveyed boring locations;
- Subsurface and Foundation Data Sheets conforming to ODOT standards (see Task 8);
- Discussion of regional and site specific geology, seismicity, and seismic hazards;
- Summary of subsurface conditions encountered;
- Summary of hydraulic conditions relevant to the bridge foundation and geotechnical design considerations;
- Summary of design recommendations and evaluations as outlined in Task 6;
- Guidelines for earthwork and foundation construction; and
- Appendix items must include drill logs and color rock core photographs as provided in the engineering Geology Report, appropriate as constructed plan sheets, milestone bridge plans available at the time of the final report preparation, seismic and Lpile parameters (if not included in the body of the report) and marked up special provisions.

Use contract writing conventions when assigning responsibility.

Examples are underlined in this sample.

Consultant responsibilities

Consultant shall prepare and submit draft Geotech Report for Agency review and comment. Consultant may include graphs and illustrations in the draft Geotech Report.

Agency responsibilities

Agency will review draft Geotech Report and provide written comments back to Consultant no later than 10 days after receipt.

Deliverables and submittal requirements

Consultant shall incorporate or address Agency’s comments in the preparation of the final Geotech Report.

### **Task 7 - Consultant Deliverables and Schedule**

- Draft Geotech Report – Submit 3 hard copies within 5 weeks after receipt of Notice to Proceed (“NTP”).
- Final Geotech Report – Submit in electronic format and submit 10 hard copies within 14 days following receipt of Agency comments. Subsurface and Foundation Data Sheets must be printed on 11” x 17” paper.